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Economic security of tourism in Germany: models for overcoming the crisis

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Purpose – to analyze the models of overcoming the crisis of the tourism business in Germany.

Design/Method/Approach of the research. The research method is an expert opinion analysis on possible scenarios for the Covid-19/Coronavirus pandemic crisis development, the consequences for German tourism, and possible models of overcoming the crisis.

Findings. The paper analyzes the models of overcoming the crisis in Germany's tourism business during the gradual attenuation of the Covid-19/Coronavirus pandemic and the beginning of the national borders lento opening. That allowed us to formulate an assumption of possible scenarios while crisis overcoming in the tourism business in Germany.

Theoretical and practical implications. The analysis of possible scenarios while overcoming the crisis in the tourism business in Germany phenomena in Germany's tourism industry can be very interesting both for practitioners and for theorists studying the problems of tourism development worldwide.

Originality/Value. The article investigates the regional differences of the tourism crisis developed during the Covid-19/Coronavirus pandemic.

Based on a logical analysis of the models for overcoming the tourism business crisis in Germany, the paper analyzed factors that can affect changes in consumer habits and include vital economic aspects of the tourism business restoration. This paper expands researchers' capabilities in the crisis phenomena analysis in the tourism business and assists in the most accurate and reasonable forecasting for the long-term sustainable development and competitive advantages of tourism enterprises.

Paper type – theoretical.

Keywords: tourism business; model; crisis; Covid-19/Coronavirus pandemic.

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Економічна безпека туризму в Німеччині: моделі виходу з кризи

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Мета роботи – проаналізувати моделі виходу з кризи підприємств туристичної галузі Німеччини.

Дизайн/Метод/План дослідження. Аналіз експертних висновків про можливі сценарії розвитку кризи пандемії Covid-19/Coronavirus, їх наслідки для туризму Німеччини та можливі моделі виходу з кризи.

Результати дослідження. Проаналізовано моделі виходу з кризи підприємств туристичного бізнесу Німеччини під час поступового затухання пандемії Covid-19/Coronavirus та початку процесу повільного відкриття кордонів країн. Це дозволило сформулювати припущення про можливі сценарії розвитку ситуації під час подолання кризових явищ в туристичному бізнесі Німеччини.

Теоретичне і практичне значення дослідження. Аналіз можливих сценаріїв розвитку ситуації під час подолання кризових явищ в туристичному бізнесі Німеччини може бути дуже цікавим як для практиків, так і для теоретиків, які вивчають проблеми розвитку туризму у світі.

Оригінальність/Цінність/Наукова новизна дослідження. У статті досліджено регіональні відмінності розвитку кризи туристичної сфери під час пандемії Covid-19/Coronavirus. На основі логічного аналізу моделей виходу з кризи підприємств туристичного бізнесу Німеччини проаналізовано чинники, які можуть вплинути на зміни звичок споживачів та врахувати важливі економічні аспекти відновлення туристичного бізнесу. Дана робота допоможе розширити можливості дослідників з аналізу кризових явищ в туристичному бізнесі та допоможе здійснювати максимально точний і обґрунтований прогноз на довгостроковий стійкий розвиток і конкурентні переваги туристичних підприємств.

Тип статті – теоретичний.

Ключові слова: туристичний бізнес; модель; криза; пандемія Covid-19/ Coronavirus.

Экономическая безопасность туризма в Германии: модели выхода из кризиса

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Цель исследования – проанализировать модели выхода из кризиса предприятий туристической сферы Германии.

Дизайн/Метод/План исследования. Анализ экспертных заключений о возможных сценариях развития кризиса пандемии Covid-19/Coronavirus, их последствия для туризма Германии и возможные модели выхода из кризиса.

Результаты. Проанализированы модели выхода из кризиса предприятий туристического бизнеса Германии во время постепенного затухания пандемии Covid-19 / Coronavirus и начала процесса медленного открытия границ стран. Это позволило сформулировать предположение о возможных сценариях развития ситуации во время преодоления кризисных явлений в туристическом бизнесе Германии.

Теоретическое и практическое значение исследования. Анализ возможных сценариев развития ситуации во время преодоления кризисных явлений в туристическом бизнесе Германии может быть очень интересным как для практиков, так и для теоретиков, изучающих проблемы развития туризма в мире.

Оригинальность/Ценность/Научная новизна исследования. В статье исследованы региональные различия развития кризиса туристической сферы во время пандемии Covid-19 / Coronavirus. На основе логического анализа моделей выхода из кризиса предприятий туристического бизнеса Германии проанализированы факторы, которые могут повлиять на изменения привычек потребителей и учесть важные экономические аспекты восстановления туристического бизнеса. Данная работа поможет расширить возможности исследователей из анализа кризисных явлений в туристическом бизнесе и поможет осуществлять максимально точный и обоснованный прогноз на долгосрочный устойчивое развитие и конкурентные преимущества туристических предприятий.

Тип статьи - теоретическая.

Ключевые слова: туристический бизнес; модель; кризис; пандемия Covid-19 / Coronavirus.

1. Introduction

Nowadays, tourism is a multibillion-dollar business dominated by the countries' interests that form the main tourist flows. Despite the crisis, tourism is developing quite rapidly. That brings hope for new income opportunities and more jobs almost worldwide. "Tourism is the most elegant form of development aid," said German economist L. Nettkoven in the 1970s. "Tourism makes a significant contribution to the fight against global poverty." – under this slogan, the World Tourism Organization became a specialized organization of the United Nations in 2003 (*Tourismus ist ein Milliarden geschäft*, 2020). There are almost thirty years of harsh criticism between these slogans, in-depth analysis, and challenging questions about the contribution of tourism to human development. Recently, the tourism industry has paid great attention to adequate environmental protection and respect for local people's rights in tourist locations (Mazaraki, 2019; Zikii, 2019).

Of course, tourism creates tremendous income opportunities and opens new prospects for local community development. However, in most cases, only a few locals receive income from tourism, while the majority of the destination population experiences problems from resource depletion, culture commercialization, disregard for their rights, and increased exploitation. In this case, tourism increases poverty and not reduces it. However, an increasing number of studies and concrete examples show more benefits than harm to local communities from tourism development (Meshko, Red'ko, Krups'kii, 2016; Slyvenko, Ermakova, 2018).

It is worth noting that currently in Ukraine, the whole set of tourism measures at all government levels leaves many unresolved issues. Unfortunately, we can say that Ukraine lags far behind Germany in terms of its economic potential. However, this cannot prevent the creation of advanced mechanisms for regulating the tourism business and the appropriate preconditions for overcoming the crisis during the Covid-19/Coronavirus pandemic. Therefore, we reckon that the study of Germany's positive experience in its tourism sector development may help to overcome the crisis in tourism in Ukraine.

2. Problem statement

The research aims to analyze the models of overcoming the crisis in Germany's tourism business.

3. Methods and information sources of research

The research methodological basis is an integrative analysis of models for overcoming the German tourism businesses' crisis in the gradual attenuation of the Covid-19/ Coronavirus pandemic and the beginning of the national borders lento opening. Such an analysis can be very interesting both for practitioners and for theorists studying the problems of tourism development worldwide. In particular, many experts neglect regional differences in the tourism development. Therefore, the paper expands the researchers' capabilities of the crisis phenomena analysis in the tourism business and assists in the most accurate and reasonable forecasting for long-term sustainable development and competitive advantages of tourism enterprises.

The research method is a theoretical analysis of models for overcoming the German tourism business's crisis. The analysis is based on expert judgments of a wide range of specialists and researchers in the tourism business. The "expert" bases own opinion on a set of causal factors, assessing the probability of their manifestation and impact on the situation development. The expert method advantage compared to others is the possibility of exchanging and comparing ideas owing to a clearly expressed simple structure.

The theoretical research basis is to analyze the most significant modern international and national research of international tourist

business development during a crisis. Based on a logical analysis of models for overcoming the German tourism business crisis, there were analyzed the factors influencing changes in consumer habits and including vital economic aspects of the restoration of the tourism business. Paper analyzes the regional differences impact in the development of the tourism business crisis during the Covid-19/Coronavirus pandemic. The research implements tourism researchers' work, representatives of professional associations, top management of tourism enterprises, heads of government agencies, and experts of the European Union.

4. Results

Tourism has been one of the world economy sectors that suffered the most from the coronavirus pandemic recently. The head of the World Tourism Organization (WTO), Z. Pololikashvili, believes that in 2020, the coronavirus pandemic global tourism decreases by about 70% compared to 2019. The WTO studies showed that all 217 major international tourist destinations have become inaccessible due to the transport communications cessation (UNWTO, 2020). Nevertheless, after the pandemic declined, internationally-oriented countries began to open their borders and prepare for new conditions. During the gradual quarantine overcoming, the main operation rule is tourists and staff security: wearing masks, temperature screening, and in some cases - the certificate of the Covid-19/ Coronavirus non-infection.

The study of various aspects of tourism economic security is an essential issue in world tourism development. Among the researchers studying these problems, it is necessary to note N. Korj, O. Zanosko (Korj, Zanosko, 2011), A. Golod (Golod, 2016), M. Denisenko (Denisenko, 2013), V. Tkach, and O. Kornienko (Tkach, & Kornienko, 2011). Nevertheless, the literature neither fully discloses some theoretical aspects of tourism economic security nor has a transparent system of definitions of basic concepts and phenomena. Most local scientists in their papers do not provide a clear definition of tourism economic security.

In particular, local researchers N. Korj and O. Zanosko (Korj, & Zanosko, 2011) believe that tourism economic security is primarily the formation of strategies for sustainable development of all tourism levels on such principles as defining clear boundaries for tourism development and minimizing risks.

A. Golod believes that tourism economic security is primarily tourism business security, and it is most often considered in economic research at the business level or specific tourism enterprises (Golod, 2016).

M. Denisenko (Denisenko, 2013) also considers building a reliable structure of organizational and economic mechanisms for tourism economic security based on the tourism enterprises' analysis.

V. Tkach and O. Kornienko (Tkach, Kornienko, 2011) consider forming a system of economic security of the tourism business in the context of analyzing the tourism risks features in the international economy. Based on the economic security components analysis, they determine the methods and criteria for assessing the economic security of Ukraine's tourism sector.

The research outlined areas, in our opinion, demand special attention from scientists today during the tourism sector crisis in terms of the Covid-19/ Coronavirus pandemic, which led to the choice of topic, purpose, and objectives of the research.

Studying the German experience on possible models of overcoming the tourism business crisis provoked by the Coronavirus pandemic is essential for Ukraine because tourism provides excellent opportunities for income for both the state and the regions. In particular, back in 2012, Germany became the second most popular tourist country in Europe (second after Spain), when the number of overnight stays in German hotels reached 407.3 million. The share of tourism in Germany's GDP was 4.5%, equal to 119 billion Euro (Posokhov, 2015). Furthermore, over

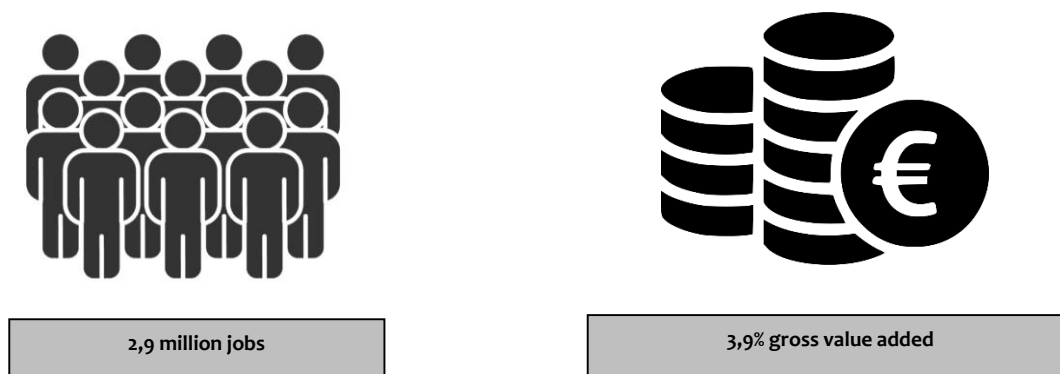
the past three years, Germany has had the highest income from tourism among EU countries - 287 billion Euro.

In 2019, 13.6 million tourists visited Ukraine, making almost \$1.4 billion in the tourism industry. Turks spend the most among foreign tourists in Ukraine, about 115 euros per day of their stay. The Americans (95 Euro) are in second place - and the Germans (94 Euro) in third. However, tourists from Germany come to us much more than others. For comparison, Ukrainian tourists in their homeland spend only 30 Euro a day on travel (*Tourismus in Europaboost*, 2020).

4.1. Analysis of tourism development in Germany before the crisis

Recently, before the start of the Covid-19/Coronavirus pandemic, tourism in Europe has developed quite dynamically. The increase in the number of business travelers and vacationers was an essential factor in Germany's economic growth (Fig. 1).

For the last three years, Germany has had the highest income from tourism among EU countries (Fig. 2).



In Germany, 2.92 million people are employed directly in tourism. That is 6.8% of the workforce.

Tourist demand provides a direct gross value added of 105.3 billion Euro. Thus, tourism accounts for 3.9% of the total gross value added of the German economy. That is a higher contribution than mechanical engineering or retail.

Fig. 1. Tourism in Germany as an employer and an economic factor*

* Source: built on (*Reiseboom in Deutschland hält an*, 2020; DSB, 2020).

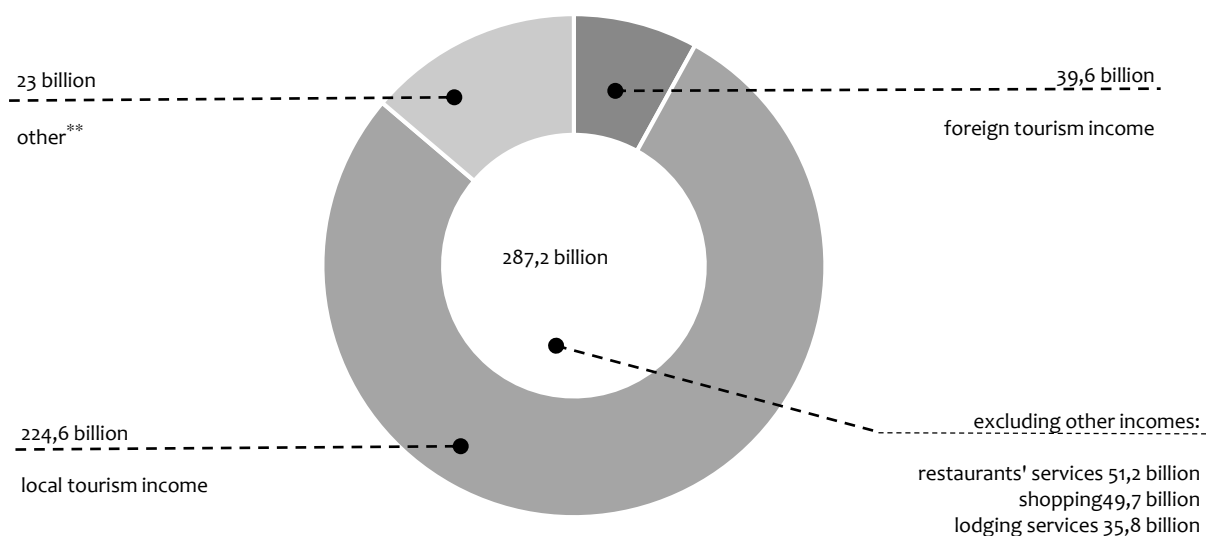


Fig.2. Income from tourism in Germany in 2018 (Euro)*

* Source: built on (*Die Deutsche Zentrale für Tourismus*, 2020; Frenzel, 2020).

** Other expenditures include government subsidies for cultural and sporting events, expenditures on durable goods for tourism purposes (e.g., mobile homes).

However, if we compare the income from travelers of individual EU member states per capita, the EU countries such as the Netherlands and Austria are ahead. Therefore, the EU member states are the most attractive tourist destination tourism; many tourists visit no other world region.

We should note that before the start of the Covid-19/Coronavirus pandemic in 28 EU countries, tourism generated about 1,276 billion Euro per annual income. Among other EU countries, Germany has the highest revenues from tourism - 287 billion Euro, slightly less

than the UK, and France - 188 billion Euro each (Dustatis. Statistisches Bundesamt, 2020).

It is worth mentioning that one-day trips have become increasingly popular in Germany (and throughout Europe) lately. One of the largest tour operators in Germany – Gute Reisen in early June 2020, offered the following number of one-day trips: Belgium - 5; in Luxembourg - 3; in the Netherlands - 6 and Germany - 7 (Frenzel, 2020).

Fig. 3 shows Germany's huge income amount from one-day local trips in 2018.

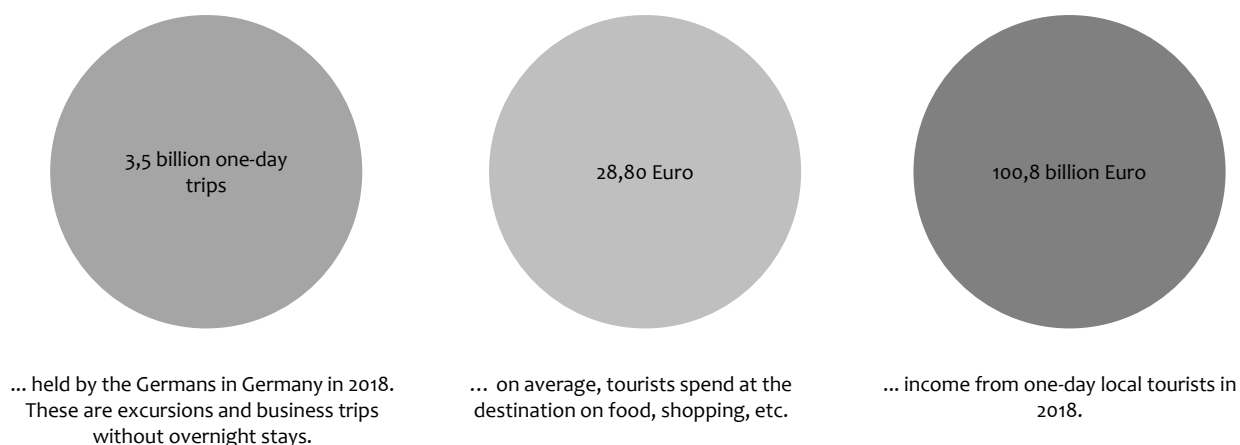
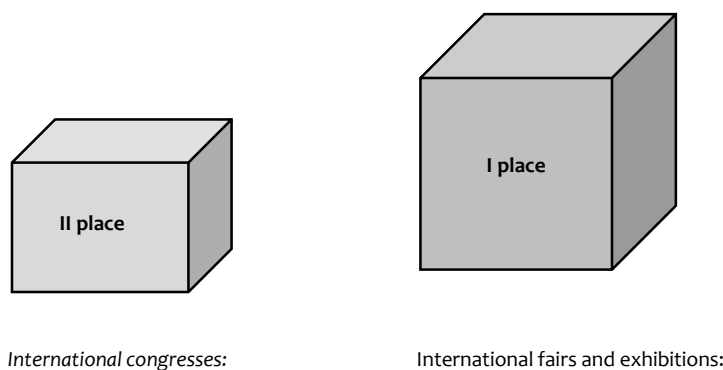


Fig. 3. Germany's income from day trips in 2018*

* Source: built on (DSB, 2020).

It is also worth noting that Germany holds the world's leading position in the development of information technology and MICE tourism (second place after the United States in the number of congresses per year and first place in the number of fairs) (Ugodnikova, Serbachenko, 2019; Zabaldina, 2019). That is not

surprising because an essential condition for attracting participants in congress and exhibition events is the degree of the country's economic development and especially new technologies development level, transport infrastructure, communications, and hotel facilities (Fig. 4).



Of the 642 international congresses in 2018, Germany ranks second after the United States (in terms of the number of participants in the congress, Germany ranks third after the United States and Spain).

In 2019, 163 international and national trade fairs took place in Germany, with 180,000 exhibitors and 9.9 million visitors. Germany's exhibition center is number 1 in the world for the most number of international trade fairs.

Fig.4. MICE tourism in Germany*

* Source: built on (Muzichka, 2019; Frenzel, 2020).

We should emphasize that the most crucial area of tourism business development in Germany was local travel. The country's revenues from local tourism are over five times higher than foreign ones. In September 2019, the National Tourism Council even approved a new program, "German Summer Cities," specifically

aimed at attracting local tourists to the country's small towns (Die Deutsche Zentrale für Tourismus, 2020). Fig. 5 demonstrates the fact that German travelers are the most important group of guests in Germany.

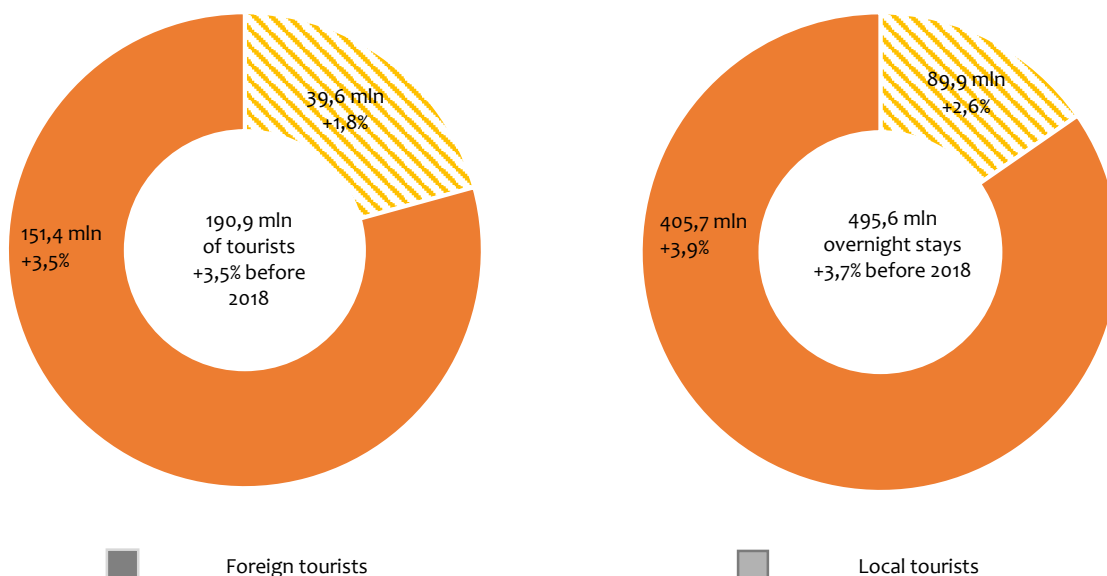


Fig. 5. The balance between foreign and local tourism in 2019 (facilities with ten or more beds)*

* Source: built on (Federal Ministry for Economic Affairs and Energy, 2020).

It is also essential that from May 25, 2020, Germany started to resume local tourism - in several federal states, hotels are open to local travelers.

If we compare the income from international tourism in Germany to other European countries, we note that annual sales in Italy and Spain also reach over 100 billion Euro. Latvia and Malta are the least profitable in the EU, where tourism income amounts to around €1 billion a year for hoteliers, restaurateurs, and other tourism businesses.

Small countries generate fewer sales in tourism than in Germany or Spain. Nevertheless, not only does the size of the country play a role, but the number of inhabitants also reflects the economic power of tourism in individual countries (Meshko, Gvozdeva, 2018; Yaremenko, Zadoya, Kappes, 2019; Zikii, 2019). Fig. 6 depicts the tourism incomes comparison with the European countries' population.



Fig. 6. Tourism Income in the EU in 2018, Euro per capita*

* Source: built on (Duplyak, Juchenko, Zabaldina, 2019).

**Note: accordingly, with a turnover of almost 5,100 Euro per capita, the Netherlands is a country where travelers are an incredibly important economic factor.

It is worth mentioning that German tourism experts are carefully studying the Netherlands' experience regulating the country's tourism development. In particular, in 2017, about 19 million tourists visited the Netherlands (the 20 million mark was probably exceeded in 2019), which is for 17 million inhabitants. The tulip fields at Keukenhof in South Holland alone attract half a million visitors each year. Amsterdam is now considered entirely

overcrowded. As locals can no longer tolerate the effects of this over-tourism, the Dutch Bureau of Tourism and Congresses (NBTC) has introduced in 2018 a document called Perspective 2030, which recommends distributing guest flows more evenly across country and seasons. For example, vacationers are encouraged to visit Dutch seaside resorts even in winter and go to Rotterdam or Utrecht instead of Amsterdam (Radchenko, 2018).

4.2. The crisis phenomena growth in German tourism during the pandemic

It is worth noting that, according to experts, with the onset of the Covid-19/ Coronavirus pandemic, the tourism industry in Germany faces a wave of unemployment. According to estimates by the Federal Association of the German Tourism Industry (BTW) in June 2020, sales in the tourism industry fell by almost eleven billion Euros. About one million people may lose their jobs (*Die Deutsche Zentrale für Tourismus*, 2020).

Such a massive decline in the global tourism industry has not been observed before. For instance, the top management of the largest

German tour operator TUI Group in early February 2020, reported that January was the best month in terms of the number of tours sold in the company's history. The company's management is now predicting a series of negative consequences of the Covid-19/ Coronavirus pandemic: a complete cessation of tour sales and a sharp reduction in jobs. According to preliminary estimates, a reduction of approximately 12% of the group's employees is possible (*Deckstein, Hecking & Spandick*, 2020).

The tourism business in Germany is collapsing due to the Covid-19/Coronavirus pandemic. It is impossible to estimate losses because the deadline for applying for bankruptcy has not come yet.

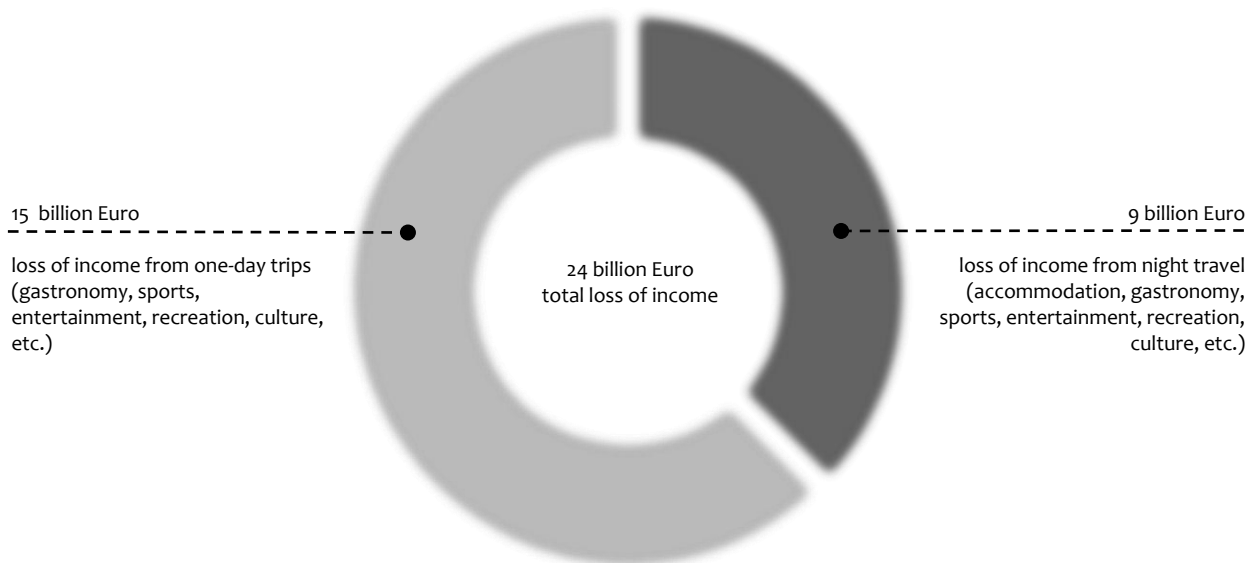


Fig. 7. Projected losses in tourist destinations in March/April 2020*

*Source: built on (*Smeral*, 2020).

In particular, the Federal Association of the German Tourism Industry (BTW) representatives conducted statistical surveys of tourism businesses (approximately 11,000 travel agencies and about 2,300 tour operators). Statistics show that two-thirds of companies believe they face bankruptcy in the short and medium-term. According to BTW experts, up to a million employees in the industry (including the hospitality business) may lose their jobs. About 70% already receive short-term unemployment benefits (*Die Deutsche Zentrale für Tourismus*, 2020).

The economic situation in the industry has deteriorated catastrophically. BTW experts note that Germany's tourism business has not only lost eleven billion Euro from declining sales by mid-June 2020, but it still needs to consider that the affected tourists will demand three to four billion Euro of compensation.

Germany's tourism industry has about three million jobs and accounts for more than four percent of production. In terms of budget revenues, the tourism business can be compared with automotive and mechanical engineering.

Germany's significant industry tourism associations call for an immediate tourism summit chaired by Chancellor A. Merkel - and a considerable increase in state aid. According to BTW experts - in June 2020, all the reserves of companies are spent and save the tourism business, and without the immediate organization of a rescue fund with fast, direct grants, it is impossible (*Smeral*, 2020).

4.3. Models analysis of tourist business crisis overcoming in Germany

4.3.1. Factors to consider when modeling

According to economic experts, a realistic forecast of tourism business development after the crisis requires considering such factors as changes in consumer habits in choosing tourist destinations, modes of transport, restaurant visits, concerts, business trips, and so on (*Boiko, Beridze, Ohrimenko*, 2019; *Gavrilko, Gushtan*, 2019). It is also necessary to consider critical economic aspects as income loss, tax reforms cessation, savings on transfer payments, increased security requirements, and losses in holiday budgets (*Bilozubenko, Korneev, Gorb*, 2018; *Malcher & Tatje*, 2020).

Experts also note regional differences in the development of the crisis Covid-19/ Coronavirus. In such periods, the regions certainly face difficulties in restoring industrial, business, and congress tourism, in organizing mass events. (*Meshko*, 2015).

Overcoming the crisis demands creativity and new solutions implementation. For example, if a museum tour can be made virtual, it is difficult to imagine traditional tourism without "tangible" impressions. Only gradually, step by step, one can return to the tourism industry's active development (*Malyuta*, 2019).

4.3.5. The crisis overcoming model from the EU Commission

It is worth noting that the pandemic affected almost the entire world tourism industry. Tour operators, travel agencies, hosts, airlines, and cruise liner operators are worried about their future. Worldwide lockdowns, closed borders, travel warnings, travel bans, overnight stays, and other operational bans dealt the most vigorous blow to the tourism sector, which has been growing steadily for decades. In particular, according to the World Tourism Organization, all 217 countries (and state-like regions) of the world have imposed restrictions on the travel of foreigners; almost three-quarters of them completely stopped international tourism at the end of April (UNWTO, 2020). It is worth mentioning that in May 2020, in Europe, there happened the first positive trends. Thus, on May 14, 2020, the EU Commission adopted the so-called "tourism package," which contained:

- guidelines for action by EU governments during the Covid-19/Coronavirus pandemic;
- recommendations to the Member States on the gradual lifting of restrictions on travel within Europe;
- recommendations for simplifying the rules for restoring travel companies operating following safety rules;
- recommendations for the gradual opening of the EU's internal borders (Tourismus in Europa, 2020).

In this package of proposals, European Commission experts suggest considering the region's epidemiological data, right places in clinics of the region for locals and tourists, and the reliable monitoring, testing, and tracking of contacts (Contact tracing). Besides, local authorities must develop contingency plans and a unique mobile application to track the possible disease outbreak locations. In turn, each hotel must ensure health protocol implementation to protect guests' and employees' health.

The European Commission's phased approach to abolishing internal border controls proposes a phased plan to weaken controls on the EU's internal borders: phase 1 - partial easing of controls, phase 2 - complete lifting of restrictions. At the same time, the entry ban of third-country nationals should be temporarily maintained.

It is worth emphasizing that according to EU experts, the tourism restoration model is only constructive if all parties in the process follow principles step-by-step actions agreed between EU countries, measures to increase the infections spread; restoration of freedom of movement under conditions that positive tendencies of improvement of an epidemiological situation are observed in the countries of departure and tourist travel.

4.3.6. The crisis overcoming model from Go-To-Travel – voucher program for travelers

Experts are carefully studying the Government of Japan's initiative that developed a program of special motivational vouchers for travelers to help rebuild tourism businesses. As part of the Go-To-Travel initiative, travelers going to Japan can start receiving subsidies of up to 20,000 yen (\$ 185) a day. The Japanese government plans to allocate 1.35 trillion yen (\$ 12.5 billion) (Malcher & Tatje, 2020) for the program. Subsidies will be vouchers for use in nearby stores and restaurants. To receive subsidies, one must book a hotel directly or with the help of Japanese travel agencies. It is worth mentioning that this program is considered by the Japanese government to stimulate local tourism after the Covid-19 pandemic.

It is planned that from July, after coordination with local authorities, new cruise routes will be implemented in the North and Baltic Seas, which were tested in 2018. (Antonenko, Mel'nik, 2019; Antonenko, Opanasyuk, 2019). It is planned that such tours will meet the demands of true lovers of water recreation. The number of days at sea will be increased, and the number of passengers will be limited to about 1000. Cruise liners must be equipped with Covid-19/Coronavirus testing equipment, and medical personnel must be increased (Frenzel, 2020).

At present, rapid restoration of business seems impossible. However, the tourism industry has high hopes for the recently adopted state aid program of 1.8 billion Euro. However, experts believe that this assistance is insufficient. TUI is currently losing about 300 million Euro a month. Analysts at Morgan Stanley US investment bank believe the group needs at least another billion Euro to survive (Smeral, 2020).

4.3.7. The crisis overcoming model from Spain. The "tourist corridors" concept

German tourism experts also consider an exciting model for overcoming the crisis of Spain's regional governments (Balearic and Canary Islands), which along with tour operators, developed the "tourist corridors" concept with special hygiene measures and large-scale tests for Covid-19/Coronavirus. The world's largest airlines Ryanair and Eurowings, decided to significantly increase the number of flights to Spain (Dal Carlo, 2020).

4.4. Practical steps

The German government plans to allow its citizens to spend their summer holidays after quarantine is over in more than 30 European countries while partially restricting contacts within the country. On May 25, the country began to resume local tourism - in several federal states; hotels began to receive local travelers. Hotels and campsites in Mecklenburg-Vorpommern, Berlin, Brandenburg, and Lower Saxony started to welcome tourists from other federal states of Germany if they made a

reservation in advance. Simultaneously, hotels have the right to accommodate guests at only 60% of capacity. On June 15, the German Federal Government partially lifted the travel ban for tourists from 31 European countries (in addition to 26 EU countries, the list also includes the United Kingdom and four Schengen countries: Iceland, Norway, Switzerland, and Liechtenstein) (Deckstein, Hecking & Spandick, 2020).

4.5. Prospects forecasting the tourist flows restoration to neighboring countries

From mid-May 2020, the German government abolished border controls with Luxembourg and significantly weakened controls on France, Austria, Switzerland, and Denmark. According to the federal government's decision, the 14-day quarantine for all who enter Germany applies only to tourists who came from third countries. According to the German Tourist Association N.Fiebig president, there are the first signs of a gradual resumption of tourism. Fig. 8 presents the restoration speed forecast of the tourism business in Germany.

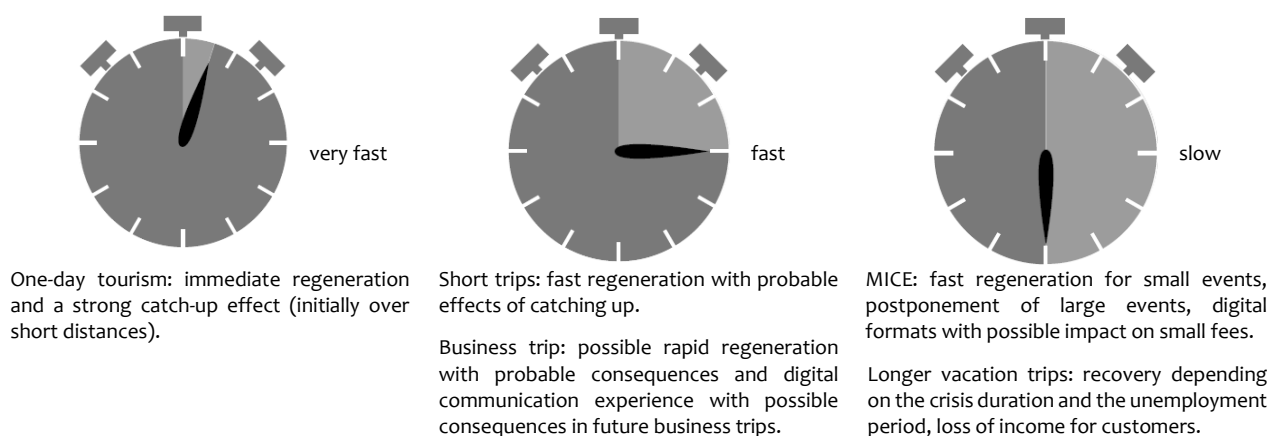


Fig. 8. Forecasting the regeneration rate of individual segments of the tourism business in Germany*

*Source: built on (Die Deutsche Zentrale für Tourismus, 2020).

It is worth noting that the nearest prospects for the tourism business restoration experts include Germany's cooperation with neighboring countries. In particular, experts from the Schauinsland-Reisen tour operator believe that the border opening will immediately positively impact the tour business. Schauinsland management expects this to increase the number of travel bookings. Analytical findings of another tour operator - FTI Touristik also confirm the immediate positive effect of opening borders, which leads to the situation normalization in the tour business, as Germany's neighbors are the most important travel market. (Frenzel, 2020).

Austria could become a popular holiday destination for many Germans in 2020, as this alpine country is easily accessible by car. The government of this country also counts on German tourists because many hotel businesses are in danger of bankruptcy without them. Therefore, they consider the Germans as the most important group of foreign guests. In the summer of 2018, they accounted for about 29.5 million nights in hotels, boarding houses, or apartments (Bilozubenko, Korneev, Gorb, 2018).

Traveling to France is likely to be less available during the summer of 2020. The form of recreation to be in demand after the borders' opening is still challenging to predict. The French government introduced one of the strictest quarantine regimes in Europe, and even citizens are not allowed to travel more than a hundred kilometers from their place of residence. All departments along the border with Germany and Paris are in the so-called "red zone,"

where restrictions are even more vital than in the rest of the country (Tourismus ist ein Milliarden geschäft, 2020).

Filling tourist flows to Denmark is also at risk. Its government has no plans to allow tourists into the country shortly as they expect a significant easing of the Covid-19 / Coronavirus pandemic.

4.6. Restoration prospects of traditional for the Germans Mediterranean destinations

Current experts predict that the Covid-19/Coronavirus pandemic crisis is similar to the financial crisis of 2008/2009. Tourism expert E.Smeral believes that it is necessary to consider a Covid-19/Coronavirus effect, such as delayed decision-making in business, which leads not only to falling demand but also to changing consumer expectations. The tourism business cessation reduced production in many related sectors of the economy. The Covid-19/Coronavirus crisis mainly affected hotels, restaurants, airlines, travel agencies, and tour operators (Smeral, 2020). Recreation, entertainment, culture, and retail businesses (excluding food and beverages) suffered the most. Those businesses the entire market in almost one night due to restrictions on freedom of movement and forced closure.

Modeling the pandemic situation shows that depending on the degree of escalation and the extent of the infection, Europe's GDP's decline rate can average more than 10%. Unfortunately, statistics for the current tourist year are not yet available for analysis in full, but we can assume that the number of international

arrivals in 2020 may decrease by about a third. Current research by EU Commission experts conducted in late March 2020 showed a sharp decline in tourism revenues at the beginning of the pandemic crisis than during the recession in 2009. Therefore, we can assume that 2020 will be considered as lost to tourism.

5. Conclusions

Thus, a realistic development model of the German tourism business after the crisis requires considering a large number of factors that may affect changes in consumer habits and include vital economic aspects of the tourism business. An important factor is the regional differences in the development of the Covid-19/Coronavirus crisis. Modeling the gradual restoration of the tourism business in Germany suggests that one-day tourism can resume fast enough, then short-term local travel in the country will be significantly revived. A less dynamic situation awaits the resumption of MICE tourism and traditional international tours. More predictable is the slow restoration of tourism exchange with neighboring countries after gradual borders opening.

Tourism development experts in Germany offer several models for overcoming the crisis. In particular, experts from the Federal Association of the German Tourism Industry proposed to introduce a special voucher to reimburse customers and compensate for the money spent on resolving disputes. The government of Mecklenburg-Vorpommern plans to provide tourism companies with a subsidy of 1,000 euros per employee. Large companies - tour operators (TUI) developed a unique "health check" method for all resorts and will offer their customers a vacation only where it is guaranteed safe. They also offer new routes in the North and Baltic Seas under new rules: increasing the number of days at sea, limiting passengers to about 1000; mandatory Covid-19/Coronavirus testing, and a significant increase in medical staff. Also considered in the future: the Japanese Go-To-Travel tour operator's initiative to provide foreign travelers with a motivating subsidy as a voucher for use in nearby shops and restaurants and the Spanish "tourist corridors" concept with special hygiene measures and large-scale tests on Covid-19/Coronavirus.

Overcoming the crisis requires creativity and new solutions implementation. Only gradually, step by step, the German tourism business will return to active development.

The research results can be implemented in the tourism sector to further research risks in the tourism market. Further research is to develop a comprehensive mechanism for measuring the impact of the risk on the tourism business economic security. This mechanism aims to develop and design such an economic security system for the tourism sector that reduces the crisis impact on tourism enterprises' stability.

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7. The competing interests

The authors declare that they have no competing interests.

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